

# Virginia Department of Taxation

## eForms User Guide

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This user guide provides instructions for using the Virginia Department of Taxation's [eForms](#) system: an easy, fast and free way to file and pay state taxes electronically.

Visit the eForms [page](#) for the list of tax returns supported by this online system.

You may also find assistance for eForms in the [Frequently Asked Questions](#) section.

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With the user guide, you will have the opportunity to see images of eForms screens before you use the system to file and pay your tax returns.

This user guide will cover four important areas of eForms:

- Filing and paying tax due returns
- Filing zero due tax returns
- Saving your eForm information = Draft Return
- Reusing your eForm information = Starter Return

These icons will appear throughout the user guide to help you understand how to use eForms.



Steps to Follow



Important Items to Note



Caution / Alert

## Filing and Paying Tax Due Returns

For this example, this screen is displayed if you select the VA-5 Monthly tax return from the [eForms](#) page. Each form has its own screen and required fields, but there are common fields that each tax return shares. Required fields are **bolded**.

Review the numbered buttons and their descriptions as described below.

Form VA5

**Form VA-5**  
Employer's Return of Virginia Income Tax Withheld

For assistance: [See Instructions](#) or [Contact Us](#)

**For Monthly Period**

--- 2012

**Account Number**  
30- F- ---

**Business Name**

**Mailing Address**

**City** **State** **ZIP**  
 Virginia

**1. VA Income Tax Withheld**

**2. Previous Period(s) Adjustments**  
Enter a - (negative sign) for an overpayment amount.

**3. Adjustment Total**

**4. Penalty**  
(See Instructions)

**5. Interest**  
(See Instructions)

**6. Total Amount Due**

Check if this is an amended return ☐

**Status: NOT FILED**

Save As Draft Calculate

1. **Filing Period** – Select the month / quarter and the year of the tax return.
2. **Account Number and Business Location** – Enter your 9 digit Employer Identification Number and then select your business location from the drop down menu.
3. **Business and Address Information** – Enter the business name and full address.
4. **Tax Return Information** – You are required to enter amounts in the fields that are **bolded**. You may enter amounts in the other fields as applicable. Some tax returns, like the ST-9CO below, require you to complete a schedule too.

Form ST9CO Schedule ST9B

Note: Use these tabs to navigate between your return and schedule

**Form ST-9CO**  
Virginia Retail Sales and Use Tax Return - Consolidated

**1. Gross Sales**

**2. Personal Use**

**Status: NOT FILED**

5. **Calculate** – Click the button to start the review of the tax return for any errors and to do the calculations for any computed fields.

### Important Items to Note

- **For Assistance** – At any time you can click the links to get help with filing the tax return or to contact the Tax Department.
- **Status** – The status of the tax return changes once you file (and pay).
- **Computed Fields** – After you click “Calculate”, amounts automatically appear in the gray fields based on what you enter in the other required fields. The math for some fields is computed for you.
- **Save as Draft** – Click the button to save a copy to your computer that you can retrieve and finish later. This will be addressed later in the user guide.

If there are errors after you click “Calculate”, a red message box will display with additional instructions. Fields with errors are highlighted in red.

Form VA-5

**Form VA-5**  
Employer's Return of Virginia Income Tax Withheld

For assistance: [See Instructions](#) or [Contact Us](#)

**Status: NOT FILED**

1. VA Income Tax Withheld 575

2. Previous Period(s) Adjustments  
Enter a - (negative sign) for an overpayment amount.

3. Adjustment Total

4. Penalty  
([See Instructions](#))

For Monthly Period  
May 2012

Account Number  
30- [redacted] F- 001

Business Name  
123 Company

Mailing Address  
123 Main Street

City Richmond State Virginia

Save As Draft Calculate

**1** Your form contains errors and cannot be filed. Click in each highlighted field to view and fix the error.

**2** FEIN is required.

**3**

**4**

In order to continue filing the tax return:

1. Identify which fields (highlighted in red) have errors.
2. Click in the field to review the message for that field.
3. Make the correction(s).
4. Click “Calculate” to ensure all errors have been correctly fixed.  
*NOTE: You may repeat these steps as many times as you need.*

Once there are no errors, the eForms screen below is displayed and you can click “OK” to continue to filing the tax return.

Form VA5

**Form Review – Ready to be Filed**

Your Form VA5 was reviewed and is ready to be filed.

Please review your Form VA5 information, before clicking **Pay Now** to set up your payment. If you need to change any information, click **Make Changes**.

OK

After you click “OK”, this screen is now displayed for you to review your tax return entries once more.

1. **Make Changes** – If you notice any other corrections that you need to do, click the “Make Changes” button.  
*NOTE:* You cannot make changes to the tax return once it is filed, so it is important to review your tax return fully before you submit it.
2. **Pay Now** – Click this button to indicate that the banking and payment information is ready to be entered.

#### Important Items to Note

- **Status** – The status of the tax return is still NOT FILED at this point
- **Computed Fields** – Clicking “Calculate” caused amounts to be displayed in the gray computed fields. In this example, a \$575.00 (tax due) tax return is being filed and since no other amounts were entered, the Total Amount Due now displays \$575.00 too.



Whenever there is an amount due on your tax return (like in the example above), you are required to make the payment through the eForms system. This is why the next (and only) step with your eForm is to click the Pay Now button. You will have the option to choose the date of your payment.

Once you click “Pay Now”, the Payment Details screen is displayed for you to enter banking and payment information.

**Payment Details**

Please enter your payment details below. Click **Continue** to review your payment details. Click **Cancel** to return to the form screen.

**Bank Account Number:**

**Re-Enter Bank Account Number:**

**Routing Number:**

**Amount Due:** \$575.00

**Payment Amount:**

**Payment Date:** ☒ Today ☐ Schedule payment for:

**Check Image:**

Jane Doe  
1234 Main St. Apt 101  
Lenexa, KS 66215

**PAY TO THE ORDER OF**

**Your Bank**  
Address of Your Bank  
Lenexa, KS 66215

**FOR**

123456789 1234567 1001

Bank Routing Number Bank Account Number Check #

1. **Bank Account Number** – Enter the bank account number of your checking account. To confirm you entered the correct bank account number, you must enter it a second time.
2. **Routing Number** – Enter the routing number of your checking account.
3. **Payment Amount** – Enter the payment amount to be debited from your checking account.
4. **Payment Date** – Select the payment date.
  - Today – This is the default and causes the payment to be submitted the day you file your eForm.
  - Schedule payment for – Choose this option to select a future date to submit your payment. Click the calendar icon and select a date up to 90 days from the current date.

**NOTE:** The calendar only appears after you select Schedule payment for.



DO NOT select a Payment Date later than the due date or the return will be subject to penalty and interest.

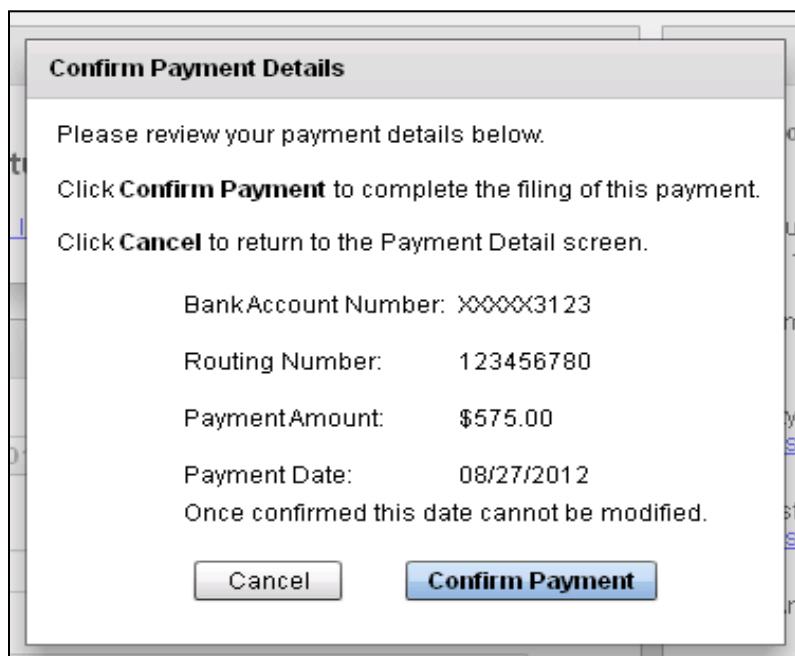
5. **Continue** – Click the button to continue filing and paying.



#### Important Items to Note

- **Cancel** – Clicking this button takes you to the previous tax return details screen, where you can make changes to the tax return as applicable.
- **Check Image** – This image is only an example to help you locate the routing number and bank account number on physical checks associated to the your checking account. The eForms system only supports payments from a checking account NOT a savings account.

After you click “Continue”, this screen is now displayed for you to review your payment details once more.



The screenshot shows a window titled "Confirm Payment Details". Inside, it says "Please review your payment details below." followed by instructions to click "Confirm Payment" to complete the filing or "Cancel" to return to the Payment Detail screen. The details listed are: BankAccount Number: XXXXX3123, Routing Number: 123456780, PaymentAmount: \$575.00, and Payment Date: 08/27/2012. A note states "Once confirmed this date cannot be modified." At the bottom are two buttons: "Cancel" and "Confirm Payment".

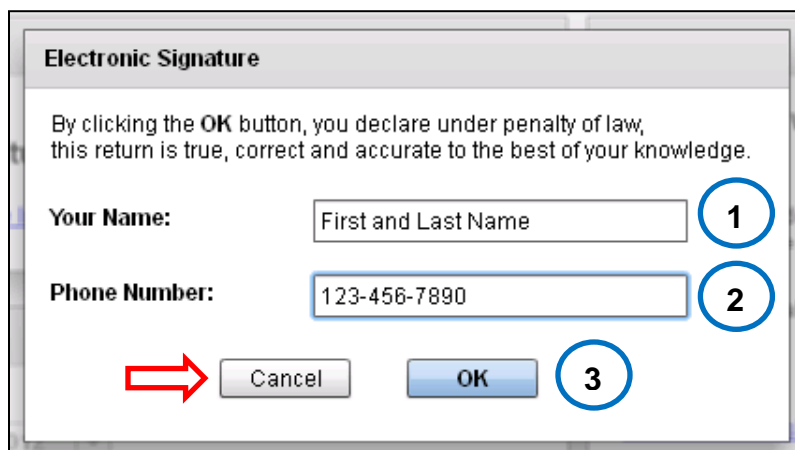
- **Cancel** – Clicking this button takes you to the previous payment details screen, where you can make changes to the payment information as applicable.



For example, you may wish to change the Payment Date you originally selected, as it cannot be changed after you file your eForm.

- **Confirm Payment** – Clicking this button continues the filing and paying through eForms.

Once you click “Confirm Payment”, the Electronic Signature screen is displayed for you to “sign” your tax return.



The screenshot shows a window titled "Electronic Signature". It contains a declaration: "By clicking the OK button, you declare under penalty of law, this return is true, correct and accurate to the best of your knowledge." Below this are two input fields: "Your Name:" with the placeholder "First and Last Name" (labeled with a circled 1) and "Phone Number:" with the placeholder "123-456-7890" (labeled with a circled 2). At the bottom are two buttons: "Cancel" (with a red arrow pointing to it) and "OK" (labeled with a circled 3).

1. **Your Name** – Enter your first and last name.
2. **Phone Number** – Enter your phone number including your area code.
3. **OK** – Click this button in order to submit your eForm. This is the last step to file and pay your tax return.

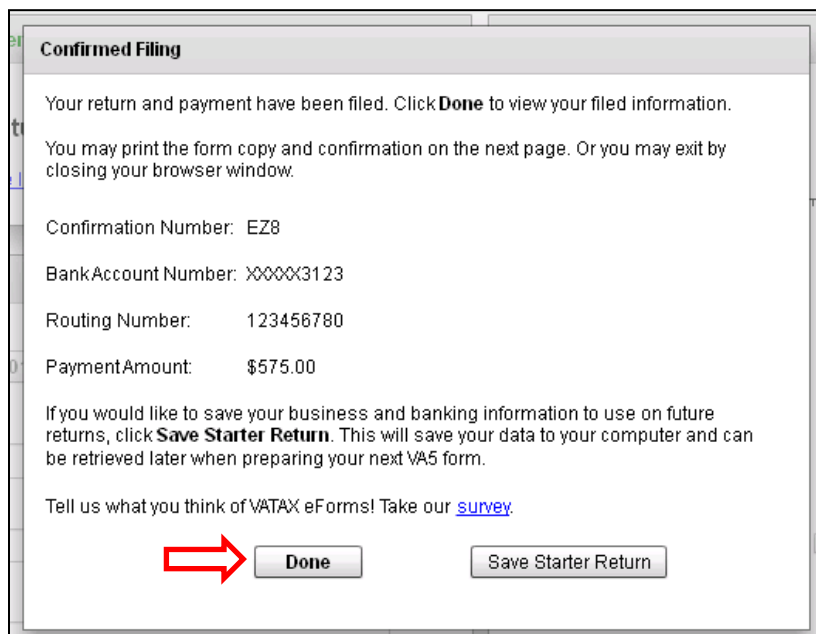


#### Important Items to Note

- **Cancel** – Clicking this button takes you to the previous payment details screen, where you can make changes to the tax return as applicable.
- **Signature** – Entering this information takes the place of a physical signature on your tax return, but is as important and carries the same responsibility as signing the paper tax return.

After you click “OK”, eForms immediately displays your Confirmation Number and basic payment details. A reminder to print a copy is also included. The Confirmation Number is your proof that you filed your tax return and payment.

The option to save and reuse business and banking information (Save Starter Return) will be addressed later in the guide.



**Confirmed Filing**

Your return and payment have been filed. Click **Done** to view your filed information.

You may print the form copy and confirmation on the next page. Or you may exit by closing your browser window.

Confirmation Number: EZ8


BankAccount Number: XXXXX3123

Routing Number: 123456780

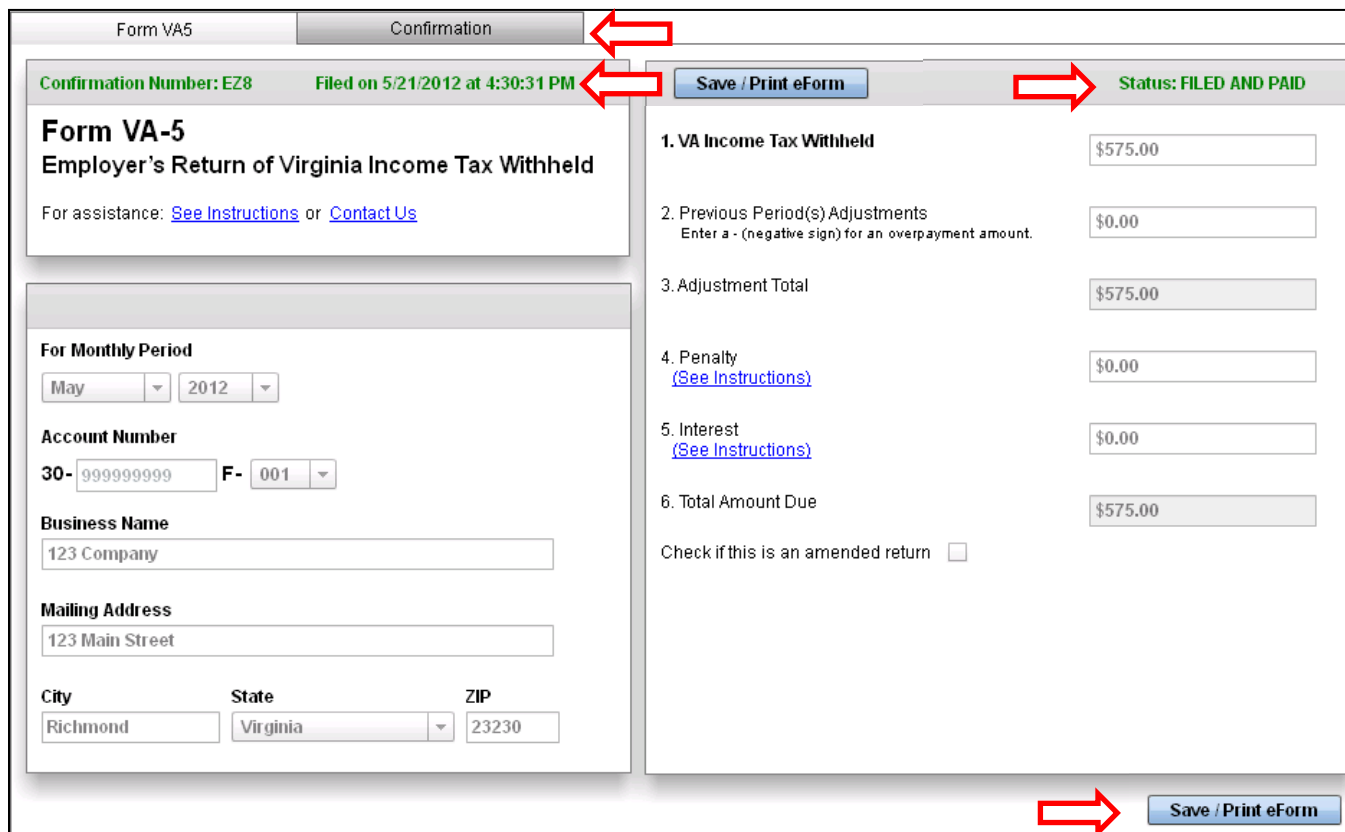
PaymentAmount: \$575.00

If you would like to save your business and banking information to use on future returns, click **Save Starter Return**. This will save your data to your computer and can be retrieved later when preparing your next VA5 form.



Tell us what you think of VATAX eForms! Take our [survey](#).

 **Done** **Save Starter Return**

Once you click “Done”, you can view the eForm you submitted. You also now have the option to Save / Print a copy of it.



Form VA5 Confirmation

Confirmation Number: EZ8 Filed on 5/21/2012 at 4:30:31 PM  **Save / Print eForm**  **Status: FILED AND PAID**

**Form VA-5**  
**Employer's Return of Virginia Income Tax Withheld**

For assistance: [See Instructions](#) or [Contact Us](#)

**For Monthly Period**  
May 2012

**Account Number**  
30- 999999999 F- 001

**Business Name**  
123 Company

**Mailing Address**  
123 Main Street

**City** **State** **ZIP**  
Richmond Virginia 23230

1. VA Income Tax Withheld \$575.00

2. Previous Period(s) Adjustments  
Enter a - (negative sign) for an overpayment amount. \$0.00


3. Adjustment Total \$575.00

4. Penalty  
(See Instructions) \$0.00

5. Interest  
(See Instructions) \$0.00

6. Total Amount Due \$575.00

Check if this is an amended return ☐

 **Save / Print eForm**

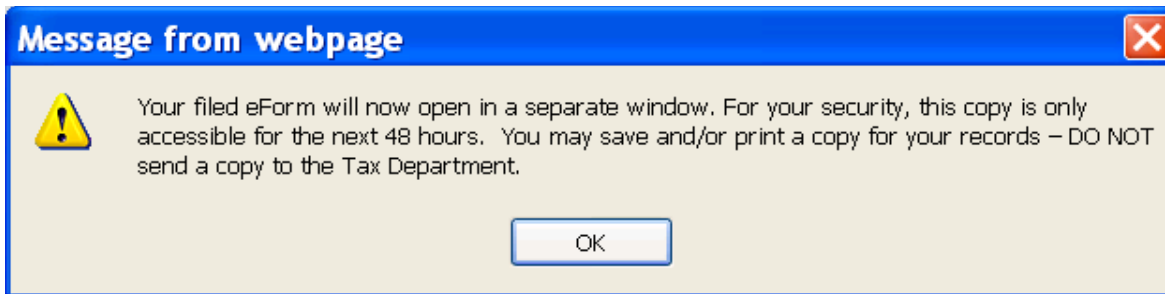
### Important Items to Note

- **Confirmation Tab** – The payment confirmation details are displayed
- **Confirmation Number and Timestamp** – Both indicate that the tax return has been filed.
- **Status** – The status of the tax return now displays FILED and the text changed from red to green.
- **Save / Print eForm** – Clicking this button allows you to Save and Print a copy of the tax return that looks similar to the paper version. Your Confirmation Number and Timestamp are also displayed.

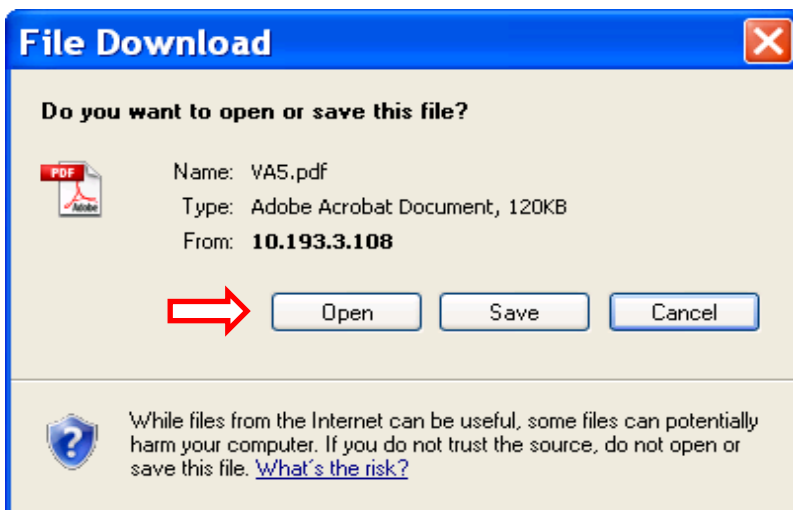
Once you click “Save / Print eForm”, eForms reminds you that the filed tax return is only a copy for your records and that it should not be sent to the Tax Department.



It is important to Save and/or Print a copy of your tax eForm. It will not be available once you close all of the screens. The next steps will help you to Save and/or Print that copy.



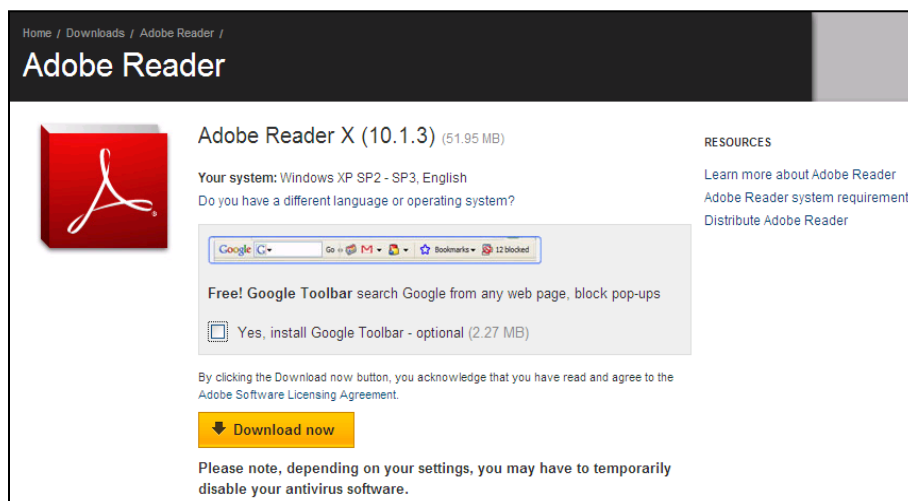
Click “OK” to open the copy in Adobe Portable Document Finder (PDF), a type of image document.



Click “Open” to view the copy of your filed tax return.



If your computer cannot open the PDF because the Adobe PDF Reader is out of date, you will be asked to update the Reader from the Adobe website. You will not be able to open the PDF until your Reader is updated. The update and the Adobe PDF Reader are free.



Example image from the Adobe Reader website.



VA5[1].pdf - Adobe Reader

File Edit View Document Tools Window Help

1 2

**Form VA-5 M** **Employer's Return of Virginia Income Tax Withheld**

PERIOD: 5/2012

**FILED ON: 05/21/2012 04:30:31 PM EST**

**CONFIRMATION #: EZ8**

ACCT NO. 30-99999999F-001 FEIN 999999999

NAME 123 Company

ADDRESS 123 Main Street

CITY RICHMOND STATE VA ZIP 23230

I declare that this return (including accompanying schedules and statements) has been examined by me and to the best of my knowledge and belief is true, correct and complete.

1. VA Income Tax Withheld \$575.00

2. Previous Period(s) Adjustments (See Instructions) \$0.00

3. Adjustment Total \$575.00

4. Penalty (See Instructions) \$0.00

5. Interest (See Instructions) \$0.00

6. Total Amount Due \$575.00

First and Last Name Signature Date 05/21/2012 Phone Number 123-456-7890

All of the information you entered is now displayed in the copy. An additional page contains payment confirmation details, which includes the Payment Date when set up for a future date.

1. **Print** – You can print the PDF copy, as displayed above, to a printer of your choosing.
2. **Save** – You can save the PDF copy to any location on your computer.

### Important Items to Note

- **Confirmation Number and Timestamp** – These numbers match the ones on the eForm screens.
- **Watermark** – This is another reminder to not send this copy to the Tax Department. Being able to see this screen means you have already submitted it electronically through eForms.

Once you click “Save”, you must decide where to save your copy and what to name it.

Picking one folder for your copies and naming each copy differently may help you track/store your tax returns.

**Save a Copy...**

Save in: Tax Returns

My Recent Documents

Desktop

My Documents

My Computer

My Network

File name: VA5 - May 2012

Save as type: Adobe PDF Files (\*.pdf)

Save

Cancel

3. **Folder** – You must select a folder or other location on your computer to save the PDF copy.
4. **File Name** – You may enter a new file name (like in the example above) or use the name displayed by eForms.
5. **Save** – You must click the button to finish saving the document to your computer.

## Filing Zero Due Tax Returns

The following example is for a VA-5 Quarterly eForm where no tax is withheld, i.e. a zero (\$0) tax return.

Form VA-5

**Form VA-5**  
Employer's Return of Virginia Income Tax Withheld

For assistance: [See Instructions](#) or [Contact Us](#)

**For Quarterly Period**  
Apr-Jun 2012

**Account Number**  
30- 88888888 F- ---

**Business Name**  
456 Company

**Mailing Address**  
456 Main Street

**City** **State** **ZIP**  
Richmond Virginia 23230

**1. VA Income Tax Withheld** ( 0 )

**2. Previous Period(s) Adjustments**  
Enter a - (negative sign) for an overpayment amount.

**3. Adjustment Total**

**4. Penalty**  
[\(See Instructions\)](#)

**5. Interest**  
[\(See Instructions\)](#)

**6. Total Amount Due**

Check if this is an amended return ☐

Save As Draft Calculate

When you file an eForm where no tax is due (\$0.00), you follow the same steps as with a tax due return (except for two steps). You must still complete the [ required fields ], review the form and electronically sign the tax return.

The different steps are as displayed in the screens below:

1. You click the "File Now" button instead of "Pay Now".
2. You do not complete the payment and banking screens.

**Form Review – Ready to be Filed**

Your Form VA5 was reviewed and is ready to be filed.

Please review your Form VA5 entries and click **File Now** to complete your filing. If you need to change any information, click **Make Changes**.

OK

**Business Name**  
456 Company

**Mailing Address**  
456 Main Street

**City** **State** **ZIP**  
Richmond Virginia 23230

**6. Total Amount Due** \$0.00

Check if this is an amended return ☐

Make Changes Save As Draft Pay Now

Make Changes Save As Draft File Now

## Saving your Information – Draft Return

As noted earlier, you may start an eForm and come back to it later. Since the information is saved to your computer, you must use the same computer in order for the Draft to be available. This example is a partially completed ST-9 eForm.

Form ST-9  
Virginia Retail Sales and Use Tax Return

For assistance: [See Instructions](#) or [Contact Us](#)

Frequency: ☒ Monthly ☐ Quarterly For Period: --- 2012

Account Number: 10- 77777777 F- 001

Business Name: 789 Company

Mailing Address: 789 Main Street

City: State: Virginia ZIP:

Check if this is an amended return ☐

Status: NOT FILED

1. Gross Sales: 4500

2. Personal Use:

3. Exempt Sales and Other Deductions: 1750

4. Total Taxable State Sales and Use:

5. State Qualifying Food (b) Taxable Amount (c) Tax:

6. State General:

7. Local (1%):

8. Total State Tax:

9. Dealer's Discount:

10. Net State Tax Due:

11. Prepaid Wireless Fee (a) Number of Items Sold (b) Fee (Net of Discount):

12. Total State and Local and Prepaid Wireless Fee Due:

13. Penalty:

14. Interest:

15. Total Amount Due:

Save As Draft Calculate

After you click "Save as Draft", this screen displays and prompts you to choose a password to save your eForm data.

Select Password

Please enter a password to better protect and to save your eForm information on your computer.

You must use this password if you want to retrieve this information later when preparing your ST9 form.

Your password must be 8-12 characters with 1 uppercase, 1 lowercase and 1 numeric character.

Enter Password: 1

Re-Enter Password:

By checking this box you agree to the [Terms & Conditions](#). 2

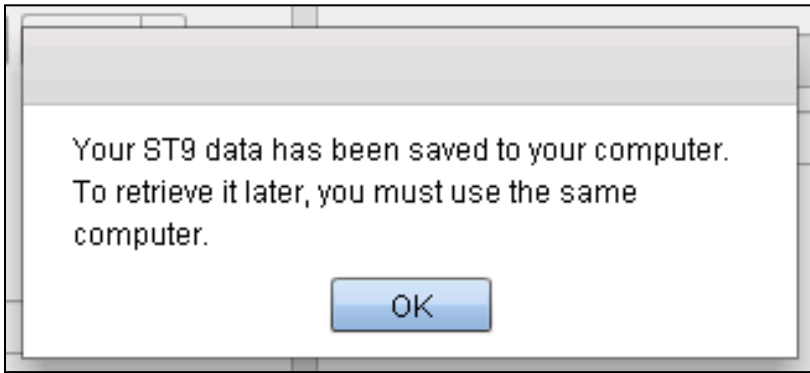
Cancel OK 3

1. **Password** – You must enter a password according to these rules: 8-12 characters with 1 uppercase, 1 lowercase and 1 numeric character. To confirm you entered the correct password, you must enter it a second time.
2. **Terms & Conditions** – You must check this box to indicate that you accept the eForms Terms and Conditions.
3. **OK** – You must click this button in order to save your eForm draft to your computer.

### Important Item to Note

- **Cancel** – Clicking this button takes you to the tax return details screen, where you can make changes to the tax return as applicable. You may then click "Save Draft" again to update any changes.

Once you click “OK”, a message will advise you that your eForm has been saved to your computer.

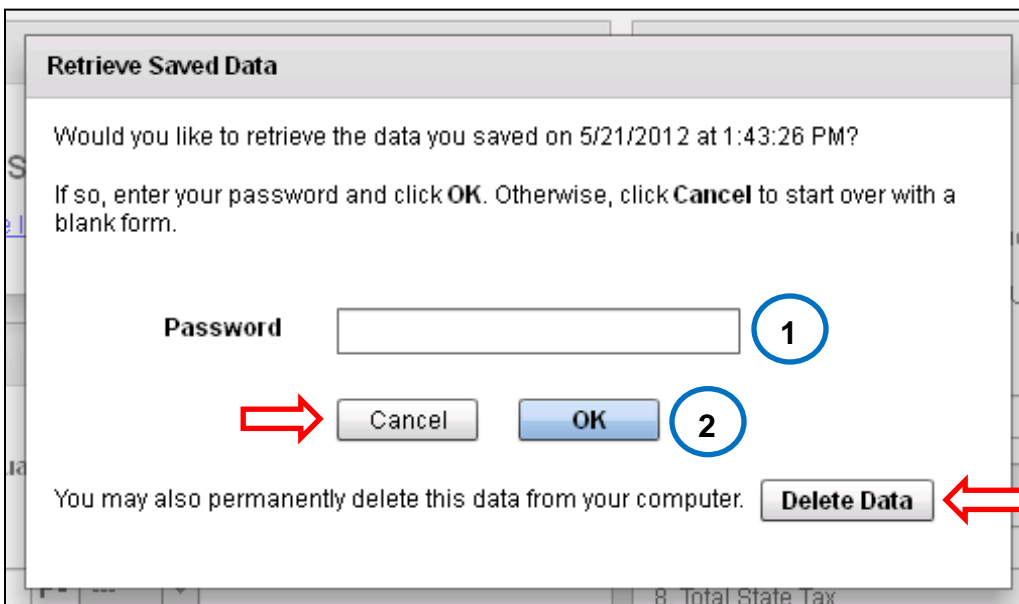


After you click “OK” on this message, you may close your saved eForm and return to the eForms home page or any other page of the Tax Department’s website.



Your eForm information will be saved to your computer to access later. If you delete your internet history before you return to complete the eForm, the saved data may no longer be retrieved.

If you are ready to complete your tax return, you must visit the eForms home page and click on the eForm you started. You will be prompted for your password to retrieve the data.



1. **Password** – You must enter the password you used to originally save the eForm draft.  
*NOTE:* The Tax Department does not store passwords and cannot reset them for you.
2. **OK** – You must click this button in order to open the saved eForm information.



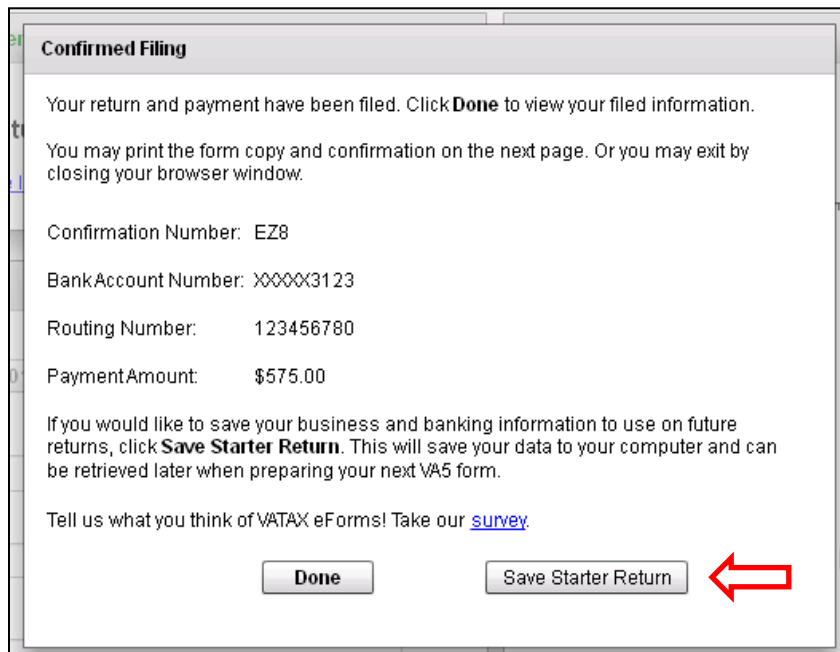
#### Important Items to Note

- **Cancel** – If you forgot your password, clicking this button will display a blank eForm for you to use.
- **Delete Data** – Clicking this button will remove all saved data related to this eForm.

## Reusing your Information – Starter Return

When you file (and pay) an eForm, you have the option to save and reuse your information with a future filing. This is referred to as a “Starter Return” and it is a button on the “Confirmed Filing” as displayed below.

This example uses the VA-5 eForm filed and paid in the beginning of this user guide.



**Confirmed Filing**

Your return and payment have been filed. Click **Done** to view your filed information.

You may print the form copy and confirmation on the next page. Or you may exit by closing your browser window.

Confirmation Number: EZ8

BankAccount Number: XXXXX3123

Routing Number: 123456780

PaymentAmount: \$575.00

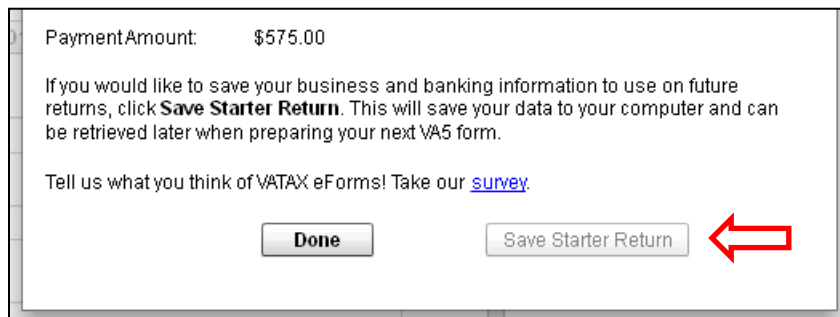
If you would like to save your business and banking information to use on future returns, click **Save Starter Return**. This will save your data to your computer and can be retrieved later when preparing your next VA5 form.

Tell us what you think of VATAX eForms! Take our [survey](#).

**Done** **Save Starter Return**

A red arrow points to the "Save Starter Return" button.

Once you click “Save Starter Return”, you will be prompted to save a password just like the steps to Save a Draft. The Starter Return is now saved to your computer and you are returned to the “Confirmed Filing” screen



PaymentAmount: \$575.00

If you would like to save your business and banking information to use on future returns, click **Save Starter Return**. This will save your data to your computer and can be retrieved later when preparing your next VA5 form.

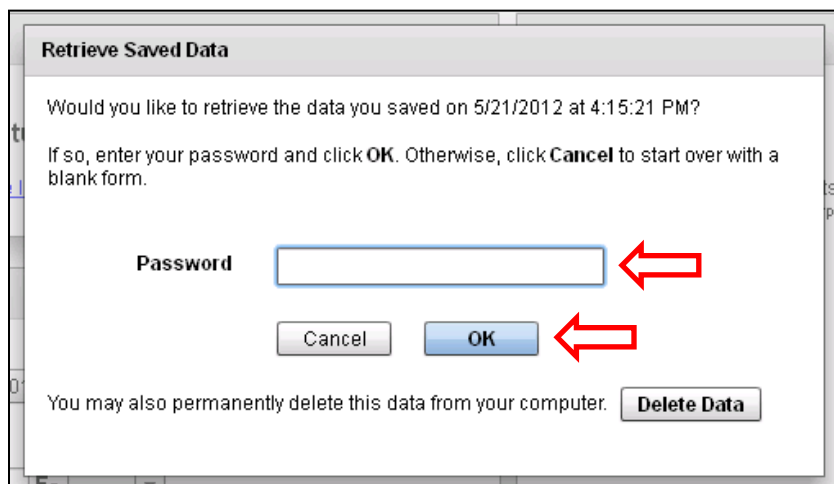
Tell us what you think of VATAX eForms! Take our [survey](#).

**Done** **Save Starter Return**

A red arrow points to the "Save Starter Return" button.

When you are ready to file the next tax return, you must visit the eForms home page and click on the eForm you started.

You will be prompted for your password to retrieve the saved data, just like the same steps for accessing a draft.



**Retrieve Saved Data**

Would you like to retrieve the data you saved on 5/21/2012 at 4:15:21 PM?

If so, enter your password and click **OK**. Otherwise, click **Cancel** to start over with a blank form.

**Password**

**Cancel** **OK**

You may also permanently delete this data from your computer. **Delete Data**

Red arrows point to the password input field and the OK button.

After you click "OK", your eForm will display the type of information saved for Starter Returns.

Form VA5

**Form VA-5**  
**Employer's Return of Virginia Income Tax Withheld**

For assistance: [See Instructions](#) or [Contact Us](#)

**For Monthly Period**

--- 2012

**Account Number**

30- 999999999 F- 001

**Business Name**

123 Company

**Mailing Address**

123 Main St

**City State ZIP**

Richmond Virginia 23230

**Status: NOT FILED**

**1. VA Income Tax Withheld**

**2. Previous Period(s) Adjustments**  
Enter a - (negative sign) for an overpayment amount.

**3. Adjustment Total**

**4. Penalty**  
[\(See Instructions\)](#)

**5. Interest**  
[\(See Instructions\)](#)

**6. Total Amount Due**

Check if this is an amended return ☐

Save As Draft Calculate

You must still complete the Filing Period and the other Required Fields all of which are bolded.

The next set of saved information will be the banking information for your checking account, as displayed below.

**Payment Details**

Please enter your payment details below. Click **Continue** to review your payment details.  
Click **Cancel** to return to the form screen.

**Bank Account Number:**

**Re-Enter Bank Account Number:**

**Routing Number:**

Amount Due: \$625.00

**Payment Amount:**

**Payment Date:**

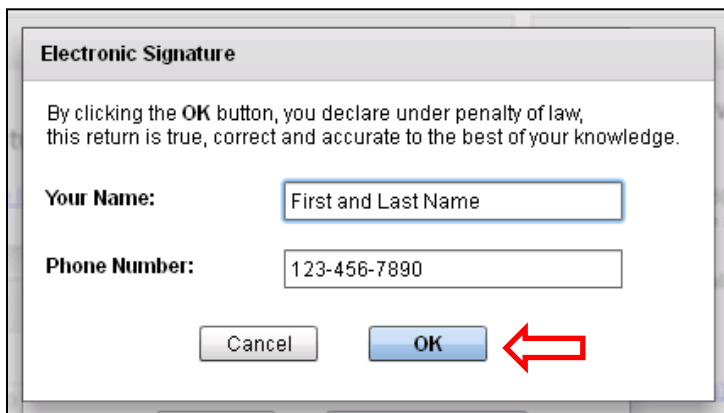
☒ Today  
☐ Schedule payment for:

Cancel Continue

Jane Doe 1234 Main St, Apt 101 1001

You must enter the Payment Amount, select a Payment Date and click "Continue" to resume filing and paying.

Your signature and phone number are also saved and displayed with the Starter Return.



**Electronic Signature**

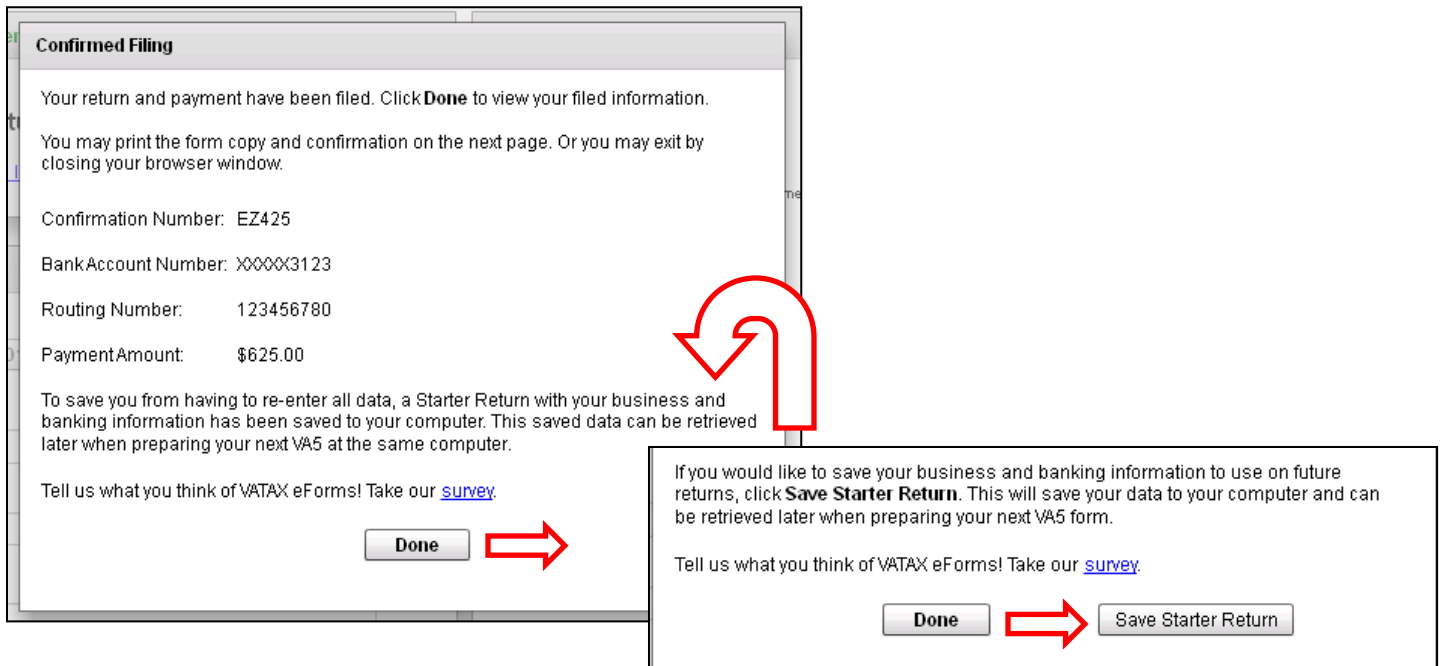
By clicking the **OK** button, you declare under penalty of law, this return is true, correct and accurate to the best of your knowledge.

**Your Name:**

**Phone Number:**

A red arrow points to the OK button.

If nothing has changed, you must click the “OK” button to submit your eForm and to receive confirmation details.



**Confirmed Filing**

Your return and payment have been filed. Click **Done** to view your filed information.

You may print the form copy and confirmation on the next page. Or you may exit by closing your browser window.

Confirmation Number: EZ425

Bank Account Number: XXXXX3123

Routing Number: 123456780

Payment Amount: \$625.00

To save you from having to re-enter all data, a Starter Return with your business and banking information has been saved to your computer. This saved data can be retrieved later when preparing your next VA5 at the same computer.

Tell us what you think of VATAX eForms! Take our [survey](#).

A red arrow points from the Done button to the Save Starter Return dialog box.

**Save Starter Return**

If you would like to save your business and banking information to use on future returns, click **Save Starter Return**. This will save your data to your computer and can be retrieved later when preparing your next VA5 form.


Tell us what you think of VATAX eForms! Take our [survey](#).

The message about the Starter Return will be updated and the information is automatically saved. You do not have to click “Save Starter Return” each time you file.

Once you file/pay and save/print your tax return (or use the “Save Draft” option), you may close the eForm screen. The following message will display.



**Windows Internet Explorer**

 Are you sure you want to navigate away from this page?

This may cause you to lose unsaved data.

Press OK to continue, or Cancel to stay on the current page.

If you are done with the eForm, you may click “OK” to leave the page.

You will then be able to view the [eForms](#) home page again. From this page you may continue filing other tax returns or navigate to other areas of the Tax Department’s website.